Ref #	Hits	Search Query	DBs	Default Operat or	Plura Is	Time Stamp
4	7	(portfolio) and investment and ((withdrawal or distribution) same fixed same percentage same amount)	US-PGP UB; USPAT; EPO; JPO; DERWEN T	OR	OFF	2005/02/17 09:04
L2	10	(portfolio) and investment and ((withdrawal or distribution) same fixed same percentage same amount)	US-PGP UB; USPAT; EPO; JPO; DERWEN T	OR	ON	2005/02/17 09:05

Note applicable for priority date.

ile 77:Conference Papers Index 1973-2002/Mar

(c) 2002 Cambridge Sci Abs

File 35:Dissertation Abs Online 1861-2002/Apr

(c) 2002 ProQuest Info&Learning

File 583:Gale Group Globalbase(TM) 1986-2002/Apr 30

(c) 2002 The Gale Group

File 65:Inside Conferences 1993-2002/Apr W4

(c) 2002 BLDSC all rts. reserv.

File 2:INSPEC 1969-2002/Apr W4

(c) 2002 Institution of Electrical Engineers

File 233:Internet & Personal Comp. Abs. 1981-2002/Apr

(c) 2002 Info. Today Inc.

File 474:New York Times Abs 1969-2002/Apr 29

(c) 2002 The New York Times

File 475: Wall Street Journal Abs 1973-2002/Apr 29

(c) 2002 The New York Times

File 99: Wilson Appl. Sci & Tech Abs 1983-2002/Mar

(c) 2002 The HW Wilson Co.

File 348: EUROPEAN PATENTS 1978-2002/APR W03

(c) 2002 European Patent Office

File 349:PCT FULLTEXT 1983-2002/UB=20020425,UT=20020418

(c) 2002 WIPO/Univentio

File 347: JAPIO Oct/1976-2001/Dec (Updated 020401)

(c) 2002 JPO & JAPIO

File 15:ABI/Inform(R) 1971-2002/Apr 29

(c) 2002 ProQuest Info&Learning

*File 15: SELECT IMAGE AVAILABILITY FOR PROQUEST FILES ENTER 'HELP PROQUEST' FOR MORE

File 9:Business & Industry(R) Jul/1994-2002/Apr 29

(c) 2002 Resp. DB Svcs.

File 810:Business Wire 1986-1999/Feb 28

(c) 1999 Business Wire

File 275:Gale Group Computer DB(TM) 1983-2002/Apr 29

(c) 2002 The Gale Group

File 476:Financial Times Fulltext 1982-2002/Apr 30

(c) 2002 Financial Times Ltd

File 610:Business Wire 1999-2002/Apr 30

(c) 2002 Business Wire.

*File 610: File 610 now contains data from 3/99 forward. Archive data (1986-2/99) is available in File 810.

File 624:McGraw-Hill Publications 1985-2002/Apr 29

(c) 2002 McGraw-Hill Co. Inc

File 636:Gale Group Newsletter DB(TM) 1987-2002/Apr 29

(c) 2002 The Gale Group

File 621:Gale Group New Prod.Annou.(R) 1985-2002/Apr 29

(c) 2002 The Gale Group

File 613:PR Newswire 1999-2002/Apr 30

(c) 2002 PR Newswire Association Inc

*File 613: File 613 now contains data from 5/99 forward.

Archive data (1987-4/99) is available in File 813.

File 813:PR Newswire 1987-1999/Apr 30

(c) 1999 PR Newswire Association Inc

File 16:Gale Group PROMT(R) 1990-2002/Apr 29

(c) 2002 The Gale Group

File 160:Gale Group PROMT(R) 1972-1989

(c) 1999 The Gale Group

File 634: San Jose Mercury Jun 1985-2002/Apr 28

(c) 2002 San Jose Mercury News

File 148: Gale Group Trade & Industry DB 1976-2002/Apr 29

(c) 2002 The Gale Group

File 20:Dialog Global Reporter 1997-2002/Apr 30

(c) 2002 The Dialog Corp.

Set S1 S2	Items 106254 132 OR	Description FINANCIAL(1W) PLANNING (FIXED(1W) PERCENTAGE OR FIXED(1W) DOLLAR) (5N) (WITHDRAWAL - PAYMENT OR DISBURSEMENT)
S3 S4	<u>5</u>	S1 AND S2 (FIXED(1W) PERCENTAGE OR FIXED(1W) DOLLAR) (5N) WITHDRAW?
		fully reviewed

.

.

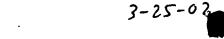
.

Set S1 Items

Description

(FIXED(1W) PERCENTAGE OR FIXED(1W) DOLLAR) (5N) WITHDRAW?

fully reviewed kulc text





Advanced Search Tips | All About Googl

Find	of the words	portfolio inflation retun Investment outcomes	n distribution	10 results F
	least one of the words t the words	1998 1999 annual mo	nthly periodic periodical	
Language	Return pages written	in	any language	
File Format	Only return resu	ults of the file format	any format ·	
Date	Return web pages up	dated in the	anytime v	
Occurrences	Return results where	my terms occur	anywhere in the page	
Domains [Only return results	s from the site or domain	e.g. google.com, .org More int	<u> </u>
SafeSearch	No filtering () Fi	lter using <u>SafeSearch</u>		***************************************
News Search	(BETA)	To browse news, se	ee the <u>Overview of Today's Hea</u>	Se adlines
Page-Specifi	c Search			
Similar Find pag	es similar to the page	a a way good combo	In html	Search
Links Find page	s that link to the page	e.g. www.google.com/he		Search
Google offers sp New! <u>Goog</u> <u>Apple Mac</u> <u>BSD Unix</u> - <u>Linux</u> - Sea <u>Microsoft</u> - <u>U.S. Gover</u>	ecialized searches on the Catalog Search - So intosh - Search for all t	the following topics earch and browse mail-or hings Mac out the BSD operating sy y pages ed pages v and .mil sites	-	

```
Set
        Items
               Description
                PORTFOLIO (S) INFLATION (S) RETURN (S) INFLATION (S) DISTR-
S1
             IBUTION (S) INVESTMENT (2W) OUTCOME
                PORTFOLIO (S) INFLATION (S) RETURN (S) RETIREMENT (S) DIS-
S2
             TRIBUTION
                RD S2 (unique items)
S3
           16
? show files;ds
File 77:Conference Papers Index 1973-2002/Jan
         (c) 2002 Cambridge Sci Abs
File 35:Dissertation Abs Online 1861-2002/Mar
         (c) 2002 ProQuest Info&Learning
File 583:Gale Group Globalbase(TM) 1986-2002/Mar 23
         (c) 2002 The Gale Group
     65:Inside Conferences 1993-2002/Mar W3
         (c) 2002 BLDSC all rts. reserv.
File
       2:INSPEC 1969-2002/Mar W4
         (c) 2002 Institution of Electrical Engineers
File 233:Internet & Personal Comp. Abs. 1981-2002/Mar
         (c) 2002 Info. Today Inc.
File 474:New York Times Abs 1969-2002/Mar 22
         (c) 2002 The New York Times
File 475:Wall Street Journal Abs 1973-2002/Mar 22
         (c) 2002 The New York Times
File 99:Wilson Appl. Sci & Tech Abs 1983-2002/Feb
         (c) 2002 The HW Wilson Co.
File 348:EUROPEAN PATENTS 1978-2002/MAR W03
         (c) 2002 European Patent Office
File 349:PCT FULLTEXT 1983-2002/UB=20020321,UT=20020314
         (c) 2002 WIPO/Univentio
File 347:JAPIO Oct/1976-2001/Nov(Updated 020305)
         (c) 2002 JPO & JAPIO
     15:ABI/Inform(R) 1971-2002/Mar 23
         (c) 2002 ProQuest Info&Learning
File
       9:Business & Industry(R) Jul/1994-2002/Mar 21
         (c) 2002 Resp. DB Svcs.
File 810:Business Wire 1986-1999/Feb 28
         (c) 1999 Business Wire
File 275:Gale Group Computer DB(TM) 1983-2002/Mar 22
         (c) 2002 The Gale Group
File 476:Financial Times Fulltext 1982-2002/Mar 25
         (c) 2002 Financial Times Ltd
File 610:Business Wire 1999-2002/Mar 25
         (c) 2002 Business Wire.
File 624:McGraw-Hill Publications 1985-2002/Mar 25
         (c) 2002 McGraw-Hill Co. Inc
File 636:Gale Group Newsletter DB(TM) 1987-2002/Mar 22
         (c) 2002 The Gale Group
File 621:Gale Group New Prod.Annou.(R) 1985-2002/Mar 22
         (c) 2002 The Gale Group
File 613:PR Newswire 1999-2002/Mar 25
         (c) 2002 PR Newswire Association Inc
File 813:PR Newswire 1987-1999/Apr 30
         (c) 1999 PR Newswire Association Inc
File 16:Gale Group PROMT(R) 1990-2002/Mar 22
         (c) 2002 The Gale Group
File 160:Gale Group PROMT(R) 1972-1989
         (c) 1999 The Gale Group
File 634:San Jose Mercury Jun 1985-2002/Mar 23
         (c) 2002 San Jose Mercury News
File 148:Gale Group Trade & Industry DB 1976-2002/Mar 22
         (c) 2002 The Gale Group
```

File 20:Dialog Global Reporter 1997-2002/Mar 25

(c) 2002 The Dialog Corp.

File 625:American Banker Publications 1981-2002/Mar 05

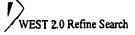
(c) 2002 American Banker

File 267:Finance & Banking Newsletters 2002/Mar 25

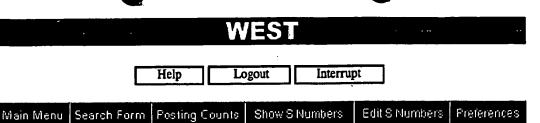
(c) 2002 The Dialog Corp.

File 268:Banking Info Source 1981-2002/Mar W3
(c) 2002 ProQuest Info&Learning

Set	Items	Description
S1	0	PORTFOLIO (S) INFLATION (S) RETURN (S) INFLATION (S) DISTR-
		BUTION (S) INVESTMENT (2W) OUTCOME .
S2	18	PORTFOLIO (S) INFLATION (S) RETURN (S) RETIREMENT (S) DIS-
	TR	RIBUTION
S3	16	RD S2 (unique items) reviewed key wird paragraphs.
2		



DB Name	<u>Query</u>	Hit Count S	Set Nam	<u>e</u>
USPT,PGPB,JPAB,EPAB	retirement same withdrwal same account same (rate or periodic or annucal or monthly)	0	<u>L1</u>	
USPT,PGPB,JPAB,EPAB	retirement same (withdraw??? or disburdement or distribut???) same account same (rate or periodic or annucal or monthly)	7	<u>L2</u>	cet
USPT,PGPB,JPAB,EPAB	(estimat\$ or project\$) near5((monthly or annual) adj5 (income or withdrawal or return))	12	<u>L3</u>	
USPT,PGPB,JPAB,EPAB	inflation and 13	3	(<u>L4</u>)	JP.
USPT,PGPB,JPAB,EPAB	14 and monte carlo	0	L5	4
USPT,PGPB,JPAB,EPAB	monte carlo same investment	81	<u>L6</u>	0
	Y	eviewed	graphs	



Search Results -

Term	Documents
ASSET.DWPI,EPAB,JPAB,USPT,PGPB.	3195
ASSETS.DWPI,EPAB,JPAB,USPT,PGPB.	2350
ALLOCATION.DWPI,EPAB,JPAB,USPT,PGPB.	42062
ALLOCATIONS.DWPI,EPAB,JPAB,USPT,PGPB.	4571
(ASSET ADJ ALLOCATION). USPT, PGPB, JPAB, EPAB, DWPI.	57

US Patents Full-Text Database
US Pre-Grant Publication Full-Text Database
JPO Abstracts Database EPO Abstracts Database
Derwent World Patents Index
Database: IBM Technical Disclosure Bulletins

Help

asset allocation Clear Refine Search:

Search History

Today's Date: 9/10/2001

Hit Count Set Name DB Name Query USPT, PGPB, JPAB, EPAB, DWPI recommend??? near4 (asset adj2 allocation) 0 USPT,PGPB,JPAB,EPAB,DWPI asset allocation 57

> abstracts reviewed 9/10/01

L Number	Hits	Search Text	DB	Time stamp
1	123	(portfolio) same asset same (distribution or withdrawal)	USPAT;	2003/09/03 10:54
			US-PGPUB; EPO: JPO:	
			DERWENT	
2	1980	(fixed) same (percentage) same amount	USPAT:	2003/09/03 10:55
* ·	1550	(ince) suite (parenings) suite unioun	US-PGPUB:	
			EPO; JPO;	
			DERWENT	
3	1869	(fixed) same (percent????) same amount	USPAT;	2003/09/03 10:56
			US-PGPUB;	
			EPO; JPO;	
			DERWENT	
4	5	((portfolio) same asset same (distribution or withdrawal)) and ((fixed) same	USPAT;	2003/09/03 10:56
1		(percentage) same amount)	US-PGPUB;	
ŀ			EPO; JPO;	
			DERWENT	<u> </u>

reviewed summary of inventor for all references